

## REPORT SUBMITTAL GUIDANCE: QUARTERLY PROGRESS REPORT

### 1. When is the Quarterly Progress Report due?

A. *Quarterly (Q)* reports are due on a calendar year basis. The following table gives the quarterly performance period and the report due date.

<u>Quarter</u>	<u>Period Covered by the Quarterly Report</u>	<u>Report Due Date</u>
1 <sup>st</sup> (1Q)	January 1 through March 31	April 30
2 <sup>nd</sup> (2Q)	April 1 through June 30	July 30
3 <sup>rd</sup> (3Q)	July 1 through September 30	October 30
4 <sup>th</sup> (4Q)	October 1 through December 31	January 30

If an award was made within the first 60 days of the quarter, the quarterly report shall cover the period from the project period start date through the end of that calendar quarter.

No quarterly report is due if the award was made less than 30 days from the end of the quarter. The information shall be included as part of the next quarterly report.

The last quarterly report is automatically waived; information should be included in the final report.

### 2. What electronic format should I use to submit the report?

A. Reports must be submitted in Adobe Portable Document Format (PDF). If you cannot meet this requirement, please notify your contract specialist and project manager via [psdrept@id.doe.gov](mailto:psdrept@id.doe.gov) for additional instructions. Awardees should expect to eventually acquire PDF capability in order to comply with reporting requirements, including a requirement for the final report to be submitted as a PDF document.

### 3. What page set-up requirements do I need to meet?

A. The report must be sized so that it can be printed on standard 8-1/2" by 11" paper. Margins on all four sides (including headers and footers) must not be smaller than one inch (1"). Font size must be Arial 11 point or equivalent.

### 4. Where is the recommended format?

A. The recommended format begins on the next page.

## QUARTERLY PROGRESS REPORT

**Project Title:** Title

**Covering Period:** Time period covered by the report (e.g., January 1, 2002 through March 31, 2002)

**Date of Report:** Date (e.g., April 25, 2002)

**Recipient:** Company/University Name  
Address

**Award Number:** DE-FC07-xxIDxxxxx

**Subcontractors:** Names

**Other Partners:** Names

**Contact(s):** Principal Investigator name, telephone number, and email address  
(List others that you wish to be identified)

**Project Team:** DOE-HQ contact; Industry contact; project mentor; contract specialist; etc., if you know these

**Project Objective:** (Paragraph) This paragraph should be the same from quarter to quarter.

**Background:** This section changes slowly, outlining the reason for the project and a brief summary of previous work completed. (One or two paragraphs)

**Status:** This section should include a concise narrative assessment of the work done in the past quarter according to the tasks for the project, as well as any problems or programmatic issues related to milestones and schedule, and how they are being resolved. The status should not contain any proprietary information or details that should not be released to the public. (This report will be made available to the public via the Internet.) If such details are important to reporting the status, a note can be included in the write-up indicating this and asking the reader to contact the PI for further information. This section is normally about a page in length.

**Plans for Next Quarter:**  
A few sentences about the plans for the next quarter and other plans according to the schedule for the project.

**Patents:** A cumulative list of patents applied for or resulting from the award.

**Publications/Presentations:**

Identify and attach all publications resulting from the award during this quarter. Identify and attach all presentations resulting from the award made to industry or government groups during this quarter.

**Milestone Status Table:** This should be a complete list of project milestones, anticipated completion dates and actual completion dates. The milestone identification number should correspond to the task numbers in your agreement to aid in tracking (example below).

ID Number	Task / Milestone Description	Planned Completion	Actual Completion	Comments
1	Molding Study			
1.1.1	Molding Literature Review	7/1/98	7/1/98	
1.1.2	Receive Foundry Data	9/30/98		New date 4/30/99
1.1.3	Receive Vendor Data	9/30/98	9/30/98	
1.1.4	Visit Foundries	9/30/98	12/31/98	
1.2.1	Select Castings	9/30/99		New date 3/31/99
1.2.2	Produce Castings	9/30/99		New date 7/31/99
1.2.3	Measure Castings	10/15/99		
1.2.4	Analyze Data	10/15/99		
1.3.1	Design Tools	7/31/99		
1.3.2	Build Tools	12/31/99		
1.3.3	Produce Castings	9/30/00		
1.3.4	Measure Castings	10/30/00		
1.3.5	Analyze Data	12/31/00		
1.4	Final Report	1/31/01		

**Budget Data** (as of date): The approved spending should not change from quarter to quarter. The actual spending should reflect the money actually spent on the project in the corresponding periods.

			Approved Spending Plan			Actual Spent to Date		
Phase / Budget Period			DOE Amount	Cost Share	Total	DOE Amount	Cost Share	Total
	From	To						
Year 1								
Year 2								
Year 3								
Year 4								
Year 5								
Totals								

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Date